

Certified Public Finance Administrator

Application for Certification Maintenance

CPFA Certification expires every five years. Maintaining certification is contingent upon the applicant meeting the General Eligibility, Education and Experience Maintenance Standards as outlined in this application. Each applicant for renewing CPFA certification must meet the following general eligibility standards:

GENERAL ELIGIBILITY

1. Applicant, in each of the five years since last certification, must have been the
 - a. duly elected or appointed treasurer, deputy or assistant treasurer, employee in/or dealing with the office of treasurer, or other principal officer in the public entity who is charged with the performance or supervision of one or more of the following responsibilities: investments, debt or treasury activities.
 - b. employee of an institution or organization whose operations are closely allied with or related to the functions of a treasurer's office.
2. Applicant must have maintained continuous Active or Associate (see APT US&C's Bylaws for definitions) membership with APT US&C for:
 - a. each of the five years since certification, and
 - b. at the time of approval.
3. Applicant must believe in and practice APT US&C's Code of Ethics (as adopted).
4. Applicant must have earned at total of 50 points in any combination of Education Maintenance Standards points and Experience Maintenance Standards points since last certification. Certifications must be renewed every five years. Those members with an expired CPFA credential must complete a new Application for Certification and only include points earned since the last certification.

APPLICATION

A non-refundable fee of one hundred twenty-five dollars (\$125.00) in US funds shall accompany the application. The application fee will be waived for the second submission if the first attempt at recertification is unsuccessful. The fee includes application processing, maintenance bar, pin, picture and press release. The applicant may send in an additional \$75.00 to receive a new certification plaque instead of a maintenance bar. Applications mailed after June 1st must include a twenty-five dollar (\$25.00) late fee in US funds.

Forward the fee along with **TWO** copies of the typewritten or electronically-completed APPLICATION and all required documentation to

CPFA Certification Committee
APT US&C
962 Wayne Avenue, Suite 910
Silver Spring, Maryland 20910

**Please direct any
general questions
to APT US&C
at (301) 495-5560.**

The application deadline is June 1st and CPFA designations are formally announced at the following APT US&C Annual Conference.

APPEALS

A candidate whose application is not approved by the CPFA Certification Committee will be notified of the Committee's decision and the steps needed to receive the credential. Should the candidate disagree with the Committee's ruling and recommendation on how to earn the necessary points for certification, the candidate may appeal the Committee's decision. The appeal must be sent in writing within thirty (30) days of notification of the Committee's decision to APT US&C's headquarters. The Committee Chair, within thirty (30) days, shall reconsider the circumstances and reverse the decision or submit the appeal to the Board of Directors for final determination.



**ASSOCIATION OF PUBLIC TREASURERS
OF THE UNITED STATES & CANADA**

Certified Public Finance Administrator

Application for Certification Maintenance

Name _____
Last First Middle Initial

Title _____

Employer _____

Address _____
Please include both mailing and shipping addresses, if different.

City _____ State/Province _____ Zip _____

Telephone _____ Fax _____

Email Address _____

Name as you would like it displayed on plaque _____

ELIGIBILITY CERTIFICATION

- I have been (1) a treasurer, deputy or assistant treasurer, employee in/or dealing with the office of treasurer, or principal officer from a public entity charged with the performance or supervision of one or more of the following responsibilities: investments, debt or treasury activities; or (2) an employee of an institution or organization whose operations are closely allied with or related to the functions of a treasurer's office for each of the five years since last certification.
- I have been an "Active" or "Associate" member of APT US&C for each of the five years since my last certification and at the time of application.
- I affirm my belief in and practice APT US&C's Code of Ethics (as adopted).
- I have enclosed either the \$125.00 application fee or \$200.00 which covers the application fee and the cost of a new CPFA plaque and understand that neither is refundable.
- I understand that certifications must be renewed every five years.

I hereby certify that I have read the items listed above and comply with all those items. I also grant permission to APT US&C to verify the accuracy of all statements and enclosures.

Signature _____

Date _____



**ASSOCIATION OF PUBLIC TREASURERS
OF THE UNITED STATES AND CANADA**

EXPERIENCE MAINTENANCE STANDARDS

All points must be earned since last certification.

| | points | maximum allowed |
|--|---------------------------------|-----------------|
| Work Experience: | | |
| • experience as a public treasurer as defined in the General Eligibility section for the five years since last certification | 4 per year | 20 |
| Other Experience: | | |
| • completion of recognized national professional achievement certification programs related to treasury management (e.g., CCM, CGFM, CPA, CPFO, CMA) | 5 per certification | 20 |
| • attendance at an annual conference of APT US&C | 5 per year | 25 |
| • attendance at a state/province APT association conference* | 2 per year | 10 |
| • service as a committee member for APT US&C or a state/province APT association* | 1 per yr per committee | 5 |
| • service as a committee chair for APT US&C or a state/province APT association* | 2 per yr per committee | 10 |
| • service as a director or parliamentarian of APT US&C or a state/province APT association* | 3 per year | 15 |
| • service as an officer of APT US&C or a state/province APT association* | 4 per year | 20 |
| • service as a mentor in the APT US&C Mentor Program | 1 per year | 5 |
| • receiving APT US&C's Certified Public Funds Investment Manager certification | 2 for Level I 5 for Level II | 7 |
| • recipient of special awards presented by APT US&C or a state/province APT association | 5 per award | 10 |
| * Applicants from states/provinces that do not have an APT state/province association may substitute points from ONE statewide or province-wide organization relating to treasury management. | | |

PRESENT POSITION:

(Must enclose certification of election or letter verifying election or appointment to office, including dates of service, to earn points. A Job Verification Form may be used.)

position _____ from _____ to _____ points _____

employer _____ total years _____ @ _____ per year = _____

responsibilities/job description _____

OTHER POSITION(S) HELD IN THE LAST FIVE YEARS, IF APPLICABLE:

(Must enclose certification of election or letter verifying election or appointment to office, including dates of service, to earn points. A Job Verification Form may be used.)

position _____ from _____ to _____ points _____

employer _____ total years _____ @ _____ per year = _____

responsibilities/job description _____

(Use additional sheet(s) as necessary.)

APT US&C ANNUAL CONFERENCE OR STATE/PROVINCE CONFERENCE:

(Attach proof of attendance.)

| | | |
|------------|-----------------------|--------------|
| year _____ | conference site _____ | points _____ |
| year _____ | conference site _____ | |
| year _____ | conference site _____ | |
| year _____ | conference site _____ | |
| year _____ | conference site _____ | |
| year _____ | conference site _____ | |
| year _____ | conference site _____ | |
| year _____ | conference site _____ | |
| year _____ | conference site _____ | |
| year _____ | conference site _____ | |
| year _____ | conference site _____ | |

COMMITTEE MEMBER/CHAIR OR DIRECTOR/OFFICER:

(Attach proof of service.)

| | | |
|------------------------------|---------------------|--------------|
| year _____ | position held _____ | points _____ |
| sponsoring association _____ | | |
| year _____ | position held _____ | |
| sponsoring association _____ | | |
| year _____ | position held _____ | |
| sponsoring association _____ | | |
| year _____ | position held _____ | |
| sponsoring association _____ | | |

(Use additional sheet(s) as necessary.)

APT US&C AWARD OR STATE/PROVINCE AWARD:

(Attach proof of award.)

| | | |
|----------------------------|------------------|--------------|
| year _____ | award name _____ | points _____ |
| awarding association _____ | | |
| conference site _____ | | |

CERTIFIED PUBLIC FUNDS INVESTMENT MANAGER:

(Attach proof of certification.)

| | | | |
|------------|---------------------|-------------|--------------|
| year _____ | training site _____ | level _____ | points _____ |
|------------|---------------------|-------------|--------------|

NATIONAL CERTIFICATION PROGRAM:

(Attach proof of certification.)

| | |
|-------------------------------|--------------|
| name of certification _____ | points _____ |
| sponsoring organization _____ | |
| certification date _____ | |

TOTAL EXPERIENCE POINTS

TOTAL _____

EDUCATION STANDARDS

| | maximum allowed |
|--|--------------------|
| All points must be earned since last certification. | |
| • completion with a C grade or better of college or university courses related to treasury management (1 point per semester hour; 2/3 of a point per quarter hour) | 25 points |
| • Bachelor degree in public administration, accounting, finance or related field | 50 points |
| • Associate degree in public administration, accounting, finance or related field | 35 points |
| • Bachelor degree in an unrelated field | 15 points |
| • Master's or Doctoral degree (5 points each) | 10 points |
| • completion of an APT US&C approved Advanced Institute (up to 30 points) AND/OR attendance at education programs pre-approved by APT US&C (assignment of points based on review of program agendas by the CPFA Certification Committee) | 40 points |
| • treasury-related education by non-APT statewide or province-wide organizations (1 point per 4 hours of instruction) | 5 points |

ASSOCIATE, BACHELOR, MASTER'S OR DOCTORAL DEGREE:

(copy of transcript must be attached to earn points)

degree _____ major _____ points _____
 college/university _____
 location _____ date received _____
 (Use additional sheet(s) as needed.)

COLLEGE/UNIVERSITY COURSES RELATED TO TREASURY MANAGEMENT:

(copy of transcript must be attached to earn points)

course name and number _____ points _____
 college/university _____
 location _____
 grade _____ credit hours _____
 (Use additional sheet(s) as needed.)

PUBLIC TREASURERS' INSTITUTE OR OTHER EDUCATION PROGRAMS:

(attach proof of course completion)

sponsored by _____ points _____
 conducted by _____
 course dates _____ date of completion _____
 course dates _____ date of completion _____
 course dates _____ date of completion _____
 course dates _____ date of completion _____
 (Use additional sheet(s) as needed.)

TOTAL EDUCATION POINTS

TOTAL _____

SUMMARY

| | |
|--|---------|
| TOTAL EXPERIENCE POINTS | _____ |
| TOTAL EDUCATION POINTS | + _____ |
| TOTAL EXPERIENCE AND EDUCATION POINTS (minimum 50 points) | ===== |



**ASSOCIATION OF PUBLIC TREASURERS
OF THE UNITED STATES & CANADA**

JOB VERIFICATION FORM

name _____
last first middle

entity _____

title _____

dates of employment _____ to _____

duties (if not treasury; must be administrative, supervisory or managerial):

(Please check all that apply.)

- | | |
|--|--|
| <input type="checkbox"/> investment of entity cash | <input type="checkbox"/> tax collection |
| <input type="checkbox"/> cash flow forecasting | <input type="checkbox"/> banking relationship |
| <input type="checkbox"/> billing and collection of special assessments | <input type="checkbox"/> bond payments |
| <input type="checkbox"/> collection of receivables | <input type="checkbox"/> bond activity |
| <input type="checkbox"/> supervisor/manager | <input type="checkbox"/> other (specify) _____ |

signature of applicant date

signature of mayor, manager or supervisor date

signature of entity clerk (if elected) date